Survey Says: What Do Americans Really Want?
Claire Worshtil, Senior Program Manager, Land Use
Outline

- Statistics: What Do Homebuyers Want and Why?
- What’s Trending Now? A look at Community Design Trends after the Great Recession
Changes in US Population
Population – Will Hit 400 Million by 2050

In Millions

<table>
<thead>
<tr>
<th>Year</th>
<th>Population (Millions)</th>
<th>Change (Millions)</th>
</tr>
</thead>
<tbody>
<tr>
<td>2010</td>
<td>309</td>
<td></td>
</tr>
<tr>
<td>2015</td>
<td>321</td>
<td>+12</td>
</tr>
<tr>
<td>2020</td>
<td>334</td>
<td>+25</td>
</tr>
<tr>
<td>2030</td>
<td>359</td>
<td>+50</td>
</tr>
<tr>
<td>2040</td>
<td>380</td>
<td>+71</td>
</tr>
<tr>
<td>2050</td>
<td>400</td>
<td>+91</td>
</tr>
</tbody>
</table>

## Population – Getting Older and more Diverse

<table>
<thead>
<tr>
<th>Race/Ethnicity</th>
<th>2010</th>
<th>2015</th>
<th>2020</th>
<th>2030</th>
</tr>
</thead>
<tbody>
<tr>
<td>White (non-Hispanic)</td>
<td>64%</td>
<td>62%</td>
<td>60%</td>
<td>55%</td>
</tr>
<tr>
<td>Black (non-Hispanic)</td>
<td>13</td>
<td>12</td>
<td>13</td>
<td>13</td>
</tr>
<tr>
<td>Asian (non-Hispanic)</td>
<td>5</td>
<td>5</td>
<td>5</td>
<td>6</td>
</tr>
<tr>
<td>Hispanic/Latino*</td>
<td>16</td>
<td>18</td>
<td>19</td>
<td>22</td>
</tr>
<tr>
<td>US Population ( Millions)</td>
<td>309</td>
<td>321</td>
<td>334</td>
<td>359</td>
</tr>
<tr>
<td>Age</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>55+</td>
<td>25%</td>
<td>28%</td>
<td>30%</td>
<td>31%</td>
</tr>
<tr>
<td>65+</td>
<td>13</td>
<td>15</td>
<td>17</td>
<td>20</td>
</tr>
</tbody>
</table>
Survey results from over 4,300 recent and prospective buyers

Emphasizes Boomers, but has results for all buyers irrespective of age

Extensive chapter on community/development features
Trade-Offs Buyers are Willing to Make
As Land Costs Rise, More People Are Willing to Accept Smaller Lots

- Smaller lot: 41% (Boomers), 40% (All Buyers)
- Smaller house: 39% (Boomers), 44% (All Buyers)
- Unfinished spaces: 35% (Boomers), 38% (All Buyers)
- Farther away from shopping: 30% (Boomers), 33% (All Buyers)
- Fewer amenities: 20% (Boomers), 22% (All Buyers)
- Longer commute to work: 16% (Boomers), 20% (All Buyers)
- Less expensive material: 8% (Boomers), 10% (All Buyers)
Share of Buyers Willing to Accept a Home Farther Away from Shopping/Entertainment to Make it Affordable by Generation

- Millennials: 36%
- Gen X: 38%
- Baby Boomers: 30%
- Seniors: 27%
Home Buyers Prefer Cul de Sacs and Simpler Roofs

- Home on a cul de sac or other street design with limited traffic flow (78%)
- Home on a continuous, interconnected street with more efficient traffic flow (22%)

# Boomers
- Home on a cul de sac or other street design with limited traffic flow (78%)
- Home on a continuous, interconnected street with more efficient traffic flow (22%)

# All Buyers
- Home on a cul de sac or other street design with limited traffic flow (78%)
- Home on a continuous, interconnected street with more efficient traffic flow (22%)
When Purchasing a New Home, Which Would You Prefer?

- Simpler roof with more space for solar panels, now or in the future: 74% (Boomers), 73% (All Buyers)
- Roof w/ more architectural detail and less space for any solar panels: 26% (Boomers), 27% (All Buyers)

Legend:
- Blue: Boomers
- Yellow: All Buyers
When Purchasing a New Home, Which Would You Prefer?

- Narrower sidewalks and streets with more green space: 55% (Boomers) vs. 53% (All Buyers)
- Wider sidewalks and streets: 45% (Boomers) vs. 47% (All Buyers)
Few Boomers or Other Home Buyers Prefer a Central City Location

<table>
<thead>
<tr>
<th></th>
<th>2007</th>
<th>2012</th>
<th>2015</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Baby Boomers</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Rural</td>
<td>31</td>
<td>28</td>
<td>28</td>
</tr>
<tr>
<td>Outlying Suburb</td>
<td>35</td>
<td>37</td>
<td>35</td>
</tr>
<tr>
<td>Close-in Suburb</td>
<td>27</td>
<td>28</td>
<td>29</td>
</tr>
<tr>
<td>Central City</td>
<td>7</td>
<td>7</td>
<td>7</td>
</tr>
<tr>
<td><strong>All Home Buyers</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Rural</td>
<td>28</td>
<td>27</td>
<td>27</td>
</tr>
<tr>
<td>Outlying Suburb</td>
<td>35</td>
<td>36</td>
<td>36</td>
</tr>
<tr>
<td>Close-in Suburb</td>
<td>30</td>
<td>30</td>
<td>30</td>
</tr>
<tr>
<td>Central City</td>
<td>7</td>
<td>8</td>
<td>8</td>
</tr>
</tbody>
</table>
• **Essential/Must have** – unlikely to buy a home without feature

• **Desirable** – seriously influenced to buy home if feature is included

• **Indifferent** – would not influence purchase decision

• **Do not want** – not likely to buy a home with this feature
# Boomers Like Communities With Single-family Homes and Convenient Shopping

<table>
<thead>
<tr>
<th>Feature</th>
<th>Essential/Must Have</th>
<th>Desirable</th>
</tr>
</thead>
<tbody>
<tr>
<td>Typically Suburban</td>
<td>70%</td>
<td>62%</td>
</tr>
<tr>
<td>Near Retail Space</td>
<td>64%</td>
<td>58%</td>
</tr>
<tr>
<td>Park Area</td>
<td>63%</td>
<td>57%</td>
</tr>
<tr>
<td>Walking/Jogging Trails</td>
<td>61%</td>
<td>55%</td>
</tr>
<tr>
<td>Lake</td>
<td>53%</td>
<td>47%</td>
</tr>
<tr>
<td>Outdoor Maintenance Service</td>
<td>46%</td>
<td>40%</td>
</tr>
<tr>
<td>Swimming Pool</td>
<td>43%</td>
<td>37%</td>
</tr>
<tr>
<td>Exercise Room</td>
<td>42%</td>
<td>36%</td>
</tr>
<tr>
<td>Gated to Control Access</td>
<td>40%</td>
<td>34%</td>
</tr>
<tr>
<td>Access to Public Transit</td>
<td>38%</td>
<td>32%</td>
</tr>
<tr>
<td>Clubhouse</td>
<td>32%</td>
<td>26%</td>
</tr>
<tr>
<td>Infill</td>
<td>25%</td>
<td>19%</td>
</tr>
<tr>
<td>Playgrounds</td>
<td>24%</td>
<td>21%</td>
</tr>
<tr>
<td>Tennis Courts</td>
<td>18%</td>
<td>15%</td>
</tr>
<tr>
<td>High Density</td>
<td>17%</td>
<td>14%</td>
</tr>
<tr>
<td>Other Mixed Use</td>
<td>16%</td>
<td>14%</td>
</tr>
<tr>
<td>Golf Course</td>
<td>14%</td>
<td>11%</td>
</tr>
<tr>
<td>Baseball or Soccer Fields</td>
<td>13%</td>
<td>11%</td>
</tr>
<tr>
<td>Daycare Center</td>
<td>7%</td>
<td>5%</td>
</tr>
</tbody>
</table>
## Top Eight Community Features by Generation

<table>
<thead>
<tr>
<th></th>
<th>Millennials</th>
<th>Gen X</th>
<th>Baby Boomers</th>
<th>Seniors</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Park area</td>
<td>Typically suburban</td>
<td>Typically suburban</td>
<td>Typically suburban</td>
</tr>
<tr>
<td>2</td>
<td>Typically suburban</td>
<td>Park area</td>
<td>Near retail space</td>
<td>Near retail space</td>
</tr>
<tr>
<td>3</td>
<td>Walking/jogging trails</td>
<td>Walking/jogging trails</td>
<td>Park area</td>
<td>Walking/jogging trails</td>
</tr>
<tr>
<td>4</td>
<td>Playgrounds</td>
<td>Near retail space</td>
<td>Walking/jogging trails</td>
<td>Park area</td>
</tr>
<tr>
<td>5</td>
<td>Near retail space</td>
<td>Lake</td>
<td>Lake</td>
<td>Outdoor maintenance service</td>
</tr>
<tr>
<td>6</td>
<td>Swimming pool</td>
<td>Swimming pool</td>
<td>Outdoor maintenance service</td>
<td>Lake</td>
</tr>
<tr>
<td>7</td>
<td>Lake</td>
<td>Exercise room</td>
<td>Swimming pool</td>
<td>Swimming pool</td>
</tr>
<tr>
<td>8</td>
<td>Exercise room</td>
<td>Playgrounds</td>
<td>Exercise room</td>
<td>Exercise room</td>
</tr>
</tbody>
</table>
Boomers, Even More than Other Buyers, Reject High Density and Golf Courses

Bar chart showing the percentage of different buyer groups who reject high density and golf courses.

- **Daycare center**
  - Millennials: 37%
  - Gen X: 32%
  - Baby Boomers: 36%
  - Seniors: 35%

- **Golf course**
  - Millennials: 38%
  - Gen X: 32%
  - Baby Boomers: 33%
  - Seniors: 35%

- **High density**
  - Millennials: 22%
  - Gen X: 25%
  - Baby Boomers: 24%
  - Seniors: 21%

- **Baseball/soccer fields**
  - Millennials: 21%
  - Gen X: 25%
  - Baby Boomers: 23%
  - Seniors: 22%

- **Tennis courts**
  - Millennials: 22%
  - Gen X: 25%
  - Baby Boomers: 23%
  - Seniors: 22%

- **Other mixed use**
  - Millennials: 27%
  - Gen X: 17%
  - Baby Boomers: 18%
  - Seniors: 18%

- **Exercise room**
  - Millennials: 30%
  - Gen X: 31%
  - Baby Boomers: 30%
  - Seniors: 31%

- **Playgrounds**
  - Millennials: 30%
  - Gen X: 32%
  - Baby Boomers: 30%
  - Seniors: 32%

- **Swimming pool**
  - Millennials: 40%
  - Gen X: 35%
  - Baby Boomers: 31%
  - Seniors: 30%

- **Infill**
  - Millennials: 24%
  - Gen X: 20%
  - Baby Boomers: 18%
  - Seniors: 18%
Why Millennials Matter
So What DO Home Buyers Want?

- Single Family
- Small Town
- Walkable
- Multifamily
- Bike Lanes
- Mixed Use
- Amenities
- Trails
- Backyard
- Front Yard
- City Living
- Low Density
- Affordable
- Great Design
- Transit
- Parks
- Suburbs
- Comprehensive Plan
- Home Ownership
- Rental
- Green
- Garages
- Good Schools
What’s Trending Now

- Mix It Up Product Types, Price Points, And even builders!
- Say Goodbye to the Front Lawn
- Interior Courtyards
- What’s Old is New
- It’s All About the Street (Or Lack There of)
- Food!
- Detach From Your Garage
- The Eco-Residence
Mix it up! Product Types, Price Points, Even Builders!
Say Goodbye to the Front Lawn
Interior Courtyards

Concord Riverwalk
West Concord, Mass.

Vantage Las Vegas
Las Vegas, Nev.
What’s Old is New
It’s All About the Street (Or Lack There of)
Food!
Food!
Detach From Your Garage
The Eco-Residence

Looney Ricks Kiss

Southshore
Aurora, Colo.
Walden - Enola, Pa.
Village of Providence – Huntsville, Ala.
Village of Providence – Huntsville, Ala.
The Pinehills – Plymouth, Mass.
The Pinehills – Plymouth, Mass.
Questions?

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